Selection Criteria for Country-of-Origin of Food Imports
by European Food Distributors

John G. Knight, David K. Holdsworth and Damien W. Mather
Marketing Department
Otago School of Business
University of Otago

Corresponding author: Dr John Knight
Marketing Department
Otago School of Business
University of Otago
PO Box 56
Dunedin, New Zealand
Phone: 64-3-479 8156
Fax: 64-3-479 8172
Email: jknight@business.otago.ac.nz

Suggested running title: COO and gatekeeper choice of food imports

Acknowledgements: The authors thank Professor Eric Arnould, Professor Michael Baker, Professor Russel Belk and Professor Phil Harris for helpful suggestions concerning earlier versions of this report.
Selection Criteria for Country-of-Origin of Food Imports
by European Food Distributors

Abstract

Country-of-origin preferences of distribution channel gatekeepers when sourcing food imports were investigated using in-depth interviews in five European markets. Channel member perceptions of product-country image related more to specific issues of confidence and trust in integrity of production, certification and regulatory systems than to country image stereotypes.

Keywords: country-of-origin; food imports; gatekeepers; trust; country image
Introduction

Images that consumers have of particular countries are well-recognised as having a major impact on propensity to purchase products from those countries (2002). Perceptions that consumers have of products from a country, as well as their feelings towards the people of that country and the desired level of interaction with those people contribute to a country stereotype (Bamossy, Beracs, Heslop, & Papadopoulos, 1986). The broader term Product-Country Image (PCI) encompasses the multidimensional nature of the images of products and brands, together with the the multiplicity of places that might be involved in the design, manufacture and assembly of products (Papadopoulos & Heslop, 1993). Drawing on the fields of stereotypy and semiotic theory, Askegaard and Ger (1998) have argued that both ‘product’ and ‘country’ are signs whose meaning “must be determined through the demasking of their denotations and the analysis of the connotations they evoke, and hence the myths they are inscribed in” (Askegaard & Ger, 1998, p.62). Stereotypes associated with a given country engender “mythological narratives” in the minds of people of other countries, and the “dimensions of place, product, market context and usage context are central to understanding contextualized product-place images” (Ger, Askegaard, & Christensen, 1999, p.165). Geographic origin is not only a cognitive cue for judgements about product quality, but also has affective (emotional) and normative (relating to personal and social norms) connotations (Verlegh & van Ittersum, 2001).

The product-country image literature is mainly concerned with high involvement consumer purchasing of durable products, and in particular products bearing well-recognised brands. Much less studied has been the importance of PCI in relation to the purchase of food products. Even less-studied has been the influence of PCI on the purchasing behaviour of food distribution channel members. This is somewhat surprising since such "gatekeepers" often
make purchasing decisions which determine the array of products available to millions of end consumers. From a managerial perspective, it is important for a nation such as New Zealand, whose economy is vitally dependent on exports of food products, to know and understand the factors that determine the outcome of such industrial, wholesale and retail buying processes. From an academic perspective, it is important to determine whether the conceptual framework that has emerged over three decades of study of PCIs in relation to decision-making by consumers applies equally to these professional buyers. If not, in what regard does this framework need to be extended?

This study concentrates on food distributors in European countries since the EU is of great importance to New Zealand as a trading partner. New Zealand as a country prides itself on being seen in overseas markets as a "clean green" source of food products and tourist destination. Great effort has been made to promote this imagery in foreign markets in the belief that the "halo" associated with this image will enhance perceptions of New Zealand products and lead to increased demand and premium prices in key markets. However, the people who ultimately decide the range of products available for consumers to choose from in these key markets are food channel members who may base their purchasing decisions on behalf of consumers on factors other than, or additional to, those that motivate end consumers. In particular, retail buyers, who can be regarded as a special subset of industrial buyers (Ettenson & Wagner, 1986), “can generally be considered ‘expert consumers’ uniquely qualified to assess product quality and desirability” (Sternquist, 1993, p.171). Wholesale and industrial buyers, being some steps removed from end-consumers, might be expected to apply different purchasing criteria. However, according to an often-cited review of industrial buying behaviour, “similar to consumer behavior, the industrial buyers often decide on factors other than rational or realistic criteria” (Sheth, 1973, p.56). “Although industrial buyers may follow
more formalized purchasing procedures, industrial buyers are no more rational in making purchase decisions than consumers” (Insch, 2003p.1).

The present study sets out to determine the relevance of product-country image in the purchasing decisions of food channel members, and to identify the elements which comprise such an image. Are these “expert consumers” influenced, as are typical consumers, by the mental representations which constitute country stereotypes? Or are these gatekeepers non-emotive analysts who base their decisions on more prosaic considerations?

**Key Issues**

The purpose of this study of gatekeepers of food distribution companies and organisations was to discover:

- factors considered by gatekeepers when choosing source countries;
- aspects of country-of-origin that gatekeepers consider are of most importance;
- the extent to which contextualized product-country images influence food purchase decisions, both by gatekeepers and (in the opinion of gatekeepers) by end-consumers;
- the elements that make up product-country images in the minds of gatekeepers, with respect to particular food categories;
- the extent to which “mythological narratives” such as "clean green" image transfer to food products from particular countries, and the span of influence which such a mental image has over the choice of food products by distribution channel members in European markets.

**Country-of-origin Effects**

Country-of-origin (COO) effects have been intensely studied over the last three decades (Al-Sulaiti & Baker, 1998, Bilkey & Nes, 1982, Han & Terpstra, 1988, Han, 1989,
COO is used by consumers to reinforce, create and bias initial perceptions of products (Johansson, 1993), and evidence has accumulated that consumers in many markets are willing to pay a premium for manufactured products from more industrialised countries. ‘Made in Germany’, ‘Made in Switzerland’ and ‘Made in Japan’ convey the notion of ‘high quality’ due to the reputation that these countries have developed – although it has not always been the case for Japan, even among Japanese themselves (Nagashima, 1977). In the 1950s and 60s Japanese products were widely regarded as ‘cheap and unreliable’, but this negative perception was reversed with the ascendency of Japanese technological excellence in the 1970s and 80s. The influence of particular events on the images of countries has been researched. The 1988 Seoul Olympic Games had a major positive impact on the image of South Korea (Jaffe & Nebenzahl, 1993) and clearly the Tiananmen Square incident in 1989 had a major negative impact on perceptions of China. So it is possible for a product-country image to change over time, sometimes rapidly, either by design or as a result of technological, social or political change.

Judgements consumers make about a country and its people transfer to evaluations of the performance of products from that country. Consumer evaluation of products is influenced by the stage of development of a country from which the product originates, with consumers (even in less-developed countries) holding less positive views of products from less-developed countries (Hulland, Todino, & Lecraw, 1996, Wang & Lamb, 1983). Heslop and Papadopoulos (1993) concluded from their eight-country study that “good products are seen to come from well-managed, technologically advanced nations with hardworking people.” Furthermore, “good products are seen to be produced by people who have refined taste, and are likeable, trustworthy and admirable for their role in world politics” (Heslop & Papadopoulos, 1993).
A meta-analysis of COO research (Verlegh & Steenkamp, 1999) concluded that COO has a larger effect on perceived quality than on attitude towards the product or purchasing intention. COO has been found to have a stronger impact on the price consumers were willing to pay (presumably related to perceived quality) when product purchase risk was high than when it was low (Hulland, Todino, & Lecraw, 1996). Agarwal and Teas (2001) found that “Consumers, when exposed to extrinsic product cues, do not just make judgments about product quality and (monetary) sacrifice, but also judgments about uncertainties that may pose potential long-term losses” (Agarwal & Teas, 2001, p.9). According to Liefeld’s (1993) meta-analysis, purchasing agents place more importance on COO in their product evaluations than do consumers. This finding may relate more to consumer durables than to fast moving consumer goods such as food products. However, from the perspective of food retailers, uncertainties and perceived risk – particularly in terms of loss of customer goodwill – are likely to be major considerations in purchasing decisions.

**Scope of Country Image Effect**

There is a general acceptance in the literature that country image effects may be specific to particular product categories, but what is the span of influence that country image carries? (Nebenzahl, Jaffe, & Lampert, 1997). Roth and Romeo (1992) found that willingness to buy a product from a particular country is high when the country image is also an important positive characteristic for the product category. Thus, perceptions vary depending on how well the country’s perceived production and marketing strengths fit with the product category. They note that “while consumers may prefer automobiles from Japan and Germany, they would rather buy crystal from Ireland and leather shoes from Italy. The interesting question for marketers is what underlies consumers’ attitudes towards products from a particular country?” (Roth & Romeo, 1992, p.493).
Nebenzahl et al. (1997) argue that country image can extend from one product category to another, but “such spillovers are more likely to occur among product categories sharing common characteristics” (p.33). For example, Japan has a strong image for car production – particularly medium priced cars, cameras, and consumer electronics; France, in perfume, fashion clothing and accessories – but also wine, cheese, and fine cuisine; Italy, in furniture, shoes and sports cars; Germany in luxury cars, cameras, and electrical appliances. So, Japan and Germany have established their image in categories of product requiring a high degree of sophistication in technology; Italy is associated with sophisticated design and style; France is associated with a sophisticated lifestyle, which bridges high fashion and also fine dining. A particular COO may be positive for one product category but negative for another. Thus, an association with France, while positive for hedonic products (e.g. perfume), was found to detract from the value of utilitarian products like machinery (Leclerc, Schmitt, & Dube, 1994).

Heslop and Papadopoulos (1993) consider that “the product image dimension of the country involved …is a response component of pride of ownership and is associated with the exquisiteness or high-class taste of the source country. The country-of-origin serves directly as a status symbol”(p.71). However, the country image cue cannot be viewed in isolation from the brand cue. Furthermore, for products manufactured away from the home country of a brand, a strong brand name may largely over-ride negative perceptions regarding a particular COO. “A Sony manufactured in Hong Kong is basically still a Sony, albeit with some slightly tarnished image” (Johansson, 1993, p.83).

**Explanatory Models**

Two popular explanatory models endeavour to account for the way in which the COO cue functions in moderating consumer behaviour (Han, 1989). According to the *halo model*,
consumers use overall perceptions about a country (even one they may know little about) to make overall evaluations of products. In turn this “halo” may influence ratings of specific tangible attributes of products (Erickson, Johansson, & Chao, 1984, Johansson, Douglas, & Nonaka, 1985). An example might be perceptions that New Zealand is “clean and green”, and/or that The Lord of the Rings movies filmed in New Zealand portray a beautiful landscape, leading to the “inferential belief” (Verlegh & van Ittersum, 2001) that New Zealand apples will taste better and have lower agricultural spray residues than competitors. Consumers may rely on country image in order to infer the quality of a specific product, since they are not in a position to determine that quality prior to purchase.

In contrast, the summary construct model proposes that consumers infer information about product attributes based on coded abstract sets of information that are stored and readily recalled from long-term memory. This model interprets the impact of COO in terms of generalising pre-existing perceptions about products made in a country to attributes of other products from the same country (Han, 1990). So, knowing that the Swiss make high quality watches and Swiss Army knives may lead consumers to expect that other manufactured durables from Switzerland are also of high quality, thereby enhancing confidence and trust in products in general from that country. Han proposed that when consumers are unfamiliar with products from a particular country, image of that country may serve as a halo (Han, 1990). As consumers become familiar with a country’s products, “country image may become a construct that summarizes consumers’ beliefs about product attributes and directly affects their brand attitude. As experience of the true attributes of a country’s products grows, provided there is consistency (“low variability in their attributes”), “the initial halo role of country image will gradually be replaced by a summary one” (Nebenzahl, Jaffe, & Lampert, 1997, p.42). Considering image of a country in association with, and in comparison with, other countries is consistent with positioning being relative to competitors (Askegaard & Ger,
Country image can be viewed as a “schema, or a network of interrelated elements that define a country, a knowledge structure that synthesises what we know of a country, together with its evaluative significance or schema-triggered affect” (Askegaard & Ger, 1998, p.53).

**Country Image and Travel Experience**

Travel experiences can be an important factor affecting formation of product-country image – either in a positive or negative manner, depending on the travel experience (Papadopoulos & Heslop, 1986). Gnoth (2002) has argued that a country brand for products can be leveraged off a tourism destination brand, whereby the tourism experience at a destination could be employed to develop the country brand across different industries. “For the tourist, the name of the country develops into a summary construct which contains a number of experientially based and strongly held beliefs. This turns into affective influence on evaluations when judging products … once the tourist is back home” (Gnoth, 2002, p.276). As indicated later, this mechanism may be particularly useful for products such as food and beverages, which will be part of the tourist experience, and which involve a high degree of implicit trust on the part of consumers.

**Country-of-origin effects on Food Products**

In contrast to consumer durables, food products are in general purchased with low involvement on the part of the consumer, although prior experience of the particular product (or brand) clearly has a major influencing role. Impulse purchasing or unplanned purchasing plays a significant role in consumer behaviour (Beatty & Ferrell, 1998, Rook, 1987), possibly accounting for more than half of total grocery items purchased (Phillips & Bradshaw, 1993). Research has shown that “the first taste is almost always with the eye;” suggesting that visual cues, such as packaging and colour greatly influence a consumer’s initial acceptance of a food
product (Imran, 1999). However, “food is both substance and symbol, material and aesthetic…” (Marshall, 1995, p.3), so many factors other than appearance and taste come into play. “The hedonic dimension inherent in food lies at the heart of … food acceptance” (Cardello, 1996, p.232). Many of the influences of food choice are mediated by individual beliefs and attitudes including factors that determine self-identity, e.g. identity with green consumerism (Shepherd & Raats, 1996).

Labels on food products potentially play an important role in influencing consumer decision-making in view of the spontaneous nature of much food purchasing behaviour. Turner (1995, p.30) concludes “people take note of food labels more than is generally thought, some of the labelling information is used some of the time, circumstances dictate what details are used at any one time, different people look for different things, and buying decisions are less likely to be swayed by labelling than by factors such as quality, value and price”. However, it is quality as perceived by the consumer rather than “objective” quality which influences a consumer’s decision process (van Triepj, Steenkamp, & Candel, 1997), and labels have the potential to sway perceptions of quality. Quality labels are a potentially valuable component of a response strategy to deal with negative media coverage of health-related food issues, although consumers have been found to display quite imperfect knowledge of what a quality label actually conveys (Verbeke & Viane, 1999). The use of Protected Denomination of Origin (PDO) labels by food companies is a mechanism to increase consumer perceptions of trust and confidence, particularly in regard to relating quality to “traditional” methods of production (Fotopoulos & Krystallis, 2003, Guerrero, 2001, von Alvensleben & Gertken, 1993). However, while many consumers may express sympathy for the concept, the reality appears to be that such labels have rather a minor effect on consumer willingness to pay more
It is commonly acknowledged that COO information influences consumers in buying food products (Hoffmann, 2000, Skaggs, Falk, Almonte, & Cardenas, 1996). Juric and Worsley (1998), surveying a random sample of New Zealand consumers, found that national image seemed to act as a halo when consumers were evaluating unfamiliar foreign food products. Ratings of American and Australian products appeared to reflect consumer knowledge about products they buy regularly, whereas prevailing public perceptions about less-developed countries may have influenced the observed negative perceptions of products from Thailand and Hungary (Juric & Worsley, 1998).

Skaggs et al. (1996, p.594) point to the importance of overall impressions of a country influencing perceptions of food products from that country: “If a consumer had never tried food products imported from China but had an image of China as a country that uses prison labour to produce exports and condones copyright infringement (as has been broadcast on recent news reports), it may cause the consumer to question the business ethics and ingredients used to produce food products there”. Hoffman’s study of Swedish consumers concluded that women use COO as a quality cue to a larger extent than men in evaluating both food quality and food safety – a result attributed to women predominantly acting as gatekeepers for the household, and tending to be more risk averse than men (Hoffmann, 2000, Nayga, 2000).
Country Name as Brand and Symbol

There are many instances where successful incorporation of a country name into branding has enhanced the perceived value of a product or product category. For example, “Ceylon tea” has been used for more than a century to differentiate tea from Sri Lanka (formerly Ceylon) from other countries’ teas, and has become synonymous with perceptions of high quality and dependability, irrespective of how little consumers may know about this country that changed its name. For two decades, Columbian coffee has been actively promoted as high quality coffee (Kotler & Gertner, 2002). A logo created in 1981 has portrayed a Columbian character named Juan Valdez and his mule to add personality to the Columbian name. This logo has been extensively used on packaging as a seal of guaranteed quality, and also in advertising and promotional materials, to reinforce the Columbian origin. These efforts to promote Columbia as a co-brand have included sponsorship of the 1995 US Open Tennis Tournament, which further enhanced recognition of the logo. A 1995 survey revealed that 83 percent of Americans interviewed identified the logo as being associated with coffee, and 53 per cent correctly identified Columbia as the country-of-origin of that coffee (Kotler & Gertner, 2002). This demonstrates the ability of skilful branding to build trust in a product from a country that might otherwise be viewed rather negatively, in the light of media coverage of drug dealing, kidnapping, murder and corruption. In this case, trust in the co-brand appears to over-ride any feelings of mistrust consumers may have towards the country.

Consumer perception of risk associated with food products has heightened in developed countries in recent years, despite significant advances in food quality and food security (Bergman, 2002). This paradox can in part be ascribed to emergence of a risk-sensitised society, in which risk messages are subject to distortion and social amplification (Slovic, 2000). Consumer perceptions of what constitutes food risk differ markedly from
country to country. For example, French consumers prefer cheese made from unpasteurized milk and are willing to accept the associated higher health risks from *Listeria* contamination, whereas the US bans sale of most unpasteurized cheese, despite this constraining consumer choice (Buzby, 2001). Given the prevailing climate of food-related fear and consumer uncertainty, a trusted COO image could have a significant moderating role to play. Hampton (1977) examined perceptions of US consumers of the risks involved in buying products made by US firms in other countries, finding that otherwise low-risk products (canned peas, instant coffee and cooking oil) made in a high-risk country were perceived as having high risk (Hampton, 1977). Buzby’s (2001) analysis (p.64) of three case studies demonstrated that “even after major international food safety incidents have been resolved or largely controlled, consumer perceptions about the implicated foods and the exporting country’s ability to produce safe food may be slow to recover.”

“Clean Green” Stereotype as Moderator of Perceived Risk

According to Sanderson et al. (2003, p.3) “the origins of the concept of a ‘clean green’ image for New Zealand are comparatively recent, commencing in the mid-1980s around the time of the Rainbow Warrior incident (1985, when French government agents planted a bomb which sank the Greenpeace ship Rainbow Warrior in Auckland harbour) and the passing of the New Zealand Nuclear Free Zone, Disarmament, and Arms Control Act (1987)” (Sanderson, Saunders, Nana, Stroombergen, Campbell, Fairweather, & Heinemann, 2003). Buhrs and Bartlett (1993, p.5) defined the essential elements of this concept thus: “New Zealand is widely perceived to be still a ‘clean and green’ country, which is not affected – at least not to the same extent as most other countries – by industrial pollution, over-population…traffic congestion, noise, and urban decay. New Zealand is commonly associated with national parks, scenic beauty, wilderness areas, beautiful deserted beaches, green
pastures and a friendly population – an image … carefully cultivated in tourism brochures.” The authors argued that the clean and green image is and always has been an inflated, if not false, representation of the country's environmental conditions and awareness (Buhrs & Bartlett, 1993). A 2001 survey found that 42% of New Zealanders thought the concept was a myth, despite the wide recognition that the concept has within New Zealand (Gendall, Healey, Robbie, Gendall, Patchett, & Bright, 2001). However, others have concluded that “New Zealand’s environmental image is indeed a key driver of the value New Zealand is able to obtain for its goods and services in the international market place …many of the key marketers of New Zealand product use New Zealand’s image as part of their marketing strategies” (Thornton, Paul, & Kerr, 2001, p.61).

Undoubtedly, New Zealand’s landscape is at the core of its unique selling proposition as a tourist destination. Tourism New Zealand has invested heavily in building the “100% Pure New Zealand” brand through a global branding initiative that showcases the country’s diverse landscapes, people, cultures and tourist activities (Morgan, Pritchard, & Piggot, 2002). But is this the imagery that influences purchase of food products? As discussed earlier, it may well be for people who have visited as tourists, but what about consumers in general? And especially, how relevant is scenic imagery to the industrial and retail food buyers who decide what is going to be available to consumers in the first place? These are the questions that underpin this study.

**Methodology**

To gain insights into the thought processes and behaviour of distribution channel members when evaluating different countries as potential sources of food products, semi-structured personal interviews were undertaken. An interview guide (Table 1) listed topic
areas to be covered – although not necessarily in the order shown. Some topics were relevant to respondents in particular sectors and less so, or not at all, to others. For example, farm animal management practices were relevant to meat distributors but not relevant to those in the seafood or fruit sectors.

This qualitative approach seemed the most practical way to explore the complexity and rich diversity of views likely in different types of company and in different countries (Gummesson, 2000, Tull & Hawkins, 1990). Katsikeas et al. (1998), reviewing the export marketing literature, argue that understanding has been hampered by over-reliance on quantitative methods (often mail questionnaires) that, while revealing the frequency of phenomena, may fail to provide deeper insights into their nature, intensity, underlying causes, and ultimate effects. In-depth personal interviews result in a richness of material that is unlikely to emerge from an indirect questionnaire (Katsikeas, Bell, & Morgan, 1998, Tull & Hawkins, 1990). From a practical point of view, it seems most unlikely that the senior level of business respondent included in this study would respond personally to a mail-out questionnaire, a task likely to be delegated, if engendering any response at all. This may explain why so few studies on food distribution channel members have been conducted, reflected in the dearth of literature on the topic.

In-depth face-to-face interviews were conducted with key informants of a convenience sample of seventeen companies and organizations. Fifteen were provided by New Zealand Trade Commissioners in Hamburg, Milan and London, who selected companies they considered to be key players in the European food distribution sector and who were willing to participate in research on food safety and food quality in relation to diverse countries-of-origin. In addition, a major meat importer in Athens and a food service buyer associated with
a major supermarket chain domiciled in the Netherlands were contacted through academic colleagues. Except for four respondents whose entire business concerned products of New Zealand origin, the respondents dealt with food from many countries other than New Zealand. Table 2 shows the profile of the respondents.

Nine of the respondents were importers and distributors of meat, seafood, fruit or manufactured food. Two were manufacturers of meat and seafood products made from imported raw ingredients. Three were buyers for major supermarket chains. Two were industry organization representatives, and one was the publisher of the leading trade magazines for the meat and seafood sectors in Italy.

The objective was to sample as much diversity as possible among the participants so that an overall view could be distilled from these diverse inputs. Patton uses the term “purposeful sampling” (Patton, 1990) to describe the recruitment procedure adopted. Glaser and Strauss (1967) consider that the desirable number of cases is determined by saturation – the diminishing marginal contribution of each additional case (Glaser & Strauss, 1967). In this study, it appeared towards the end that the marginal contribution had approached the point of saturation, in that a high degree of consistency of responses emerged.

**Interview Procedure**

Interviews were conducted at the respondent companies’ premises apart from one interview at a University in Rotterdam, and three interviews at Trade New Zealand offices. A Trade New Zealand staff member was present (at their request, for their own interest) during four of the interviews. All except one interviewee agreed to the interview being tape-recorded. Some interviews were conducted with more than one informant from the company – for example, the interview with the Italian supermarket chain involved four food buyers, although
one speaker of English provided all the recorded comment after consultation (often highly-animated) with colleagues in Italian. The interview with the German fruit importer and distributor was primarily with a fruit buyer, but then the CEO of the company arrived and added quite different perspectives on some issues.

Interviews ranged from 60 to 120 minutes, and took the form of semi-structured personal interviews, managed through an interview protocol guiding the major areas of inquiry (Denzin & Lincoln, 2000, Kvale, 1996, McCracken, 1988, Merton, Fiske, & Kendall, 1956). The interviewer aimed to establish rapport with the respondents and to have a conversation that was steered to a large extent by the interviewee and the topics that they found interesting. Consistent with this approach, the interview protocol was only loosely adhered to. In this regard, the interviews resembled the “unstructured ethnographic” format in which the researcher uses various probes to build a “conversation-like dialogue rather than asking questions that impose categorical frameworks on informants’ understanding and experiences” (Arnould & Wallendorf, 1994, p.492); ideally this approach would be complemented by “observation of behavior in context” (p.488), but it seems unlikely that gatekeepers would acquiesce to such a degree of intrusion. Despite this limitation, the desired outcome was “a richly textured interpretation” having credence for the reader, which is the aim of market-oriented ethnography (Arnould & Wallendorf, 1994, p.495).

Questions were open-ended to enable determination of what was most salient to respondents. “Once respondents have been brought within sight of the topic, they must be allowed to ‘go’ wherever they wish” (McCracken, 1988, p.40). Steps were taken to minimise the risk of social desirability bias (Schuman & Presser, 1981), “the basic human tendency to present oneself in the best possible light”(Fisher, 1993, p.303). An important technique used
to overcome the effects of social desirability is indirect questioning – a projective technique in which respondents are asked to provide opinions from the perspective of another person or group. Indirect questioning allows respondents to “describe their own feelings behind a façade of impersonality” (Simon & Simon, 1975, p.586). With this in mind, the interviewer took care to ask informants how they considered others would respond to issues – both their industrial customers and the end consumers. An example of the type of question asked is: “When consumers see products from a particular country (e.g. Vietnam) on the supermarket shelf, what do you think is likely to be running through their mind when they consider purchasing that product?” Evidence that this technique was successful came in the form of respondents distancing themselves from the answer – indicating that this is not how they themselves think, but how they believe most of their customers would think in regard to a particular issue.

Tape-recorded interviews were transcribed and comments coded on the transcripts using different text colours and marginal keywords (Coffey & Atkinson, 1996). Excerpts were labelled with multiple codes as appropriate. According to Seidel and Kelle (1995) this process has three components: (a) noticing relevant phenomena, (b) collecting examples of those phenomena, and (c) analysing those phenomena in order to find commonalities, differences, patterns and structures (Seidel & Kelle, 1995). Thematic analysis was undertaken to build a “logical chain of evidence” (Miles & Huberman, 1994). In accordance with Coffey and Atkinson 1996, this analysis aimed to preserve “the storied qualities of qualitative textual data, that is the ways in which social actors produce, represent and contextualize experience and personal knowledge through narratives and other genres” (Coffey & Atkinson, 1996) p.54. Emic (subjective significance) portrayal of individual respondent’s experiences and beliefs were then integrated into etic themes and relationships (comparative and interpreted significance), drawing on the extant literature (Arnould & Wallendorf, 1994).
Checks on Validity

Cresswell and Miller (2000, p.125), refer to qualitative researchers using “a lens not based on scores, instruments, or research designs but a lens established using the views of people who conduct, participate in, or read and review a study.” They use the term “researcher reflexivity” for the process of researchers self-disclosing their assumptions, beliefs, and biases. In this study, the interviewer was acutely aware of the potential for bias to intrude in three areas: (a) his own very obvious New Zealand origins, and the means of recruiting respondents through New Zealand Trade Commissioners, influencing respondents in their comments; (b) the interviewer’s knowledge of, and familiarity with, technical issues such as applications of genetic modification; (c) the interviewer’s background in biological science and personal experience in the international marketing of food products. The first step is to acknowledge the potential of such factors to bias collection and analysis of data, while at the same time enabling the collection of technical information; the second is to take steps to minimise any impact of such potential biases. This we have tried to do.

A preliminary version of the research findings was submitted to the participants in the study for “checking how accurately participants’ realities have been represented in the final account” (Creswell & Miller, 2000, p.125), a process regarded as “the most crucial technique for establishing credibility” (Lincoln & Guba, 1985, p.314). Changes were made in response to respondent requests in two instances. In addition, two eminent academics in the UK and one in the USA were enlisted to review the draft report from which the results reported here are derived. Changes were made on their recommendation to ensure that the draft conclusions and recommendations were a valid and credible reflection of the data collected (Knight, Holdsworth, & Mather, 2003).
Results

Issues considered when choosing particular countries as source

‘Quality’ was mentioned by most respondents as the over-riding consideration when choosing particular countries as source - especially particular quality for a given price, as indicated in Table 3. German respondents (e.g. Respondent D) and a Greek respondent (F) frequently referred to the fact that consumers in their markets are highly price-conscious, and this has a major bearing on the quality that is affordable by importers in that market. In contrast, Italian consumers appeared much less price-conscious (e.g. Respondents I and J).

As illustrated by the examples in Table 3, ‘quality’ meant different things to different respondents. For a German meat distributor (Respondent A), whose entire business relies on product from New Zealand, quality not only refers to attributes of the tangible product, but also embraces imagery associated with cleanliness and animals feeding on open pasture. This imagery is captured in his promotional material. An Italian meat distributor (J) felt that reputation of the veterinary service in the supplying country was an important determinant of quality, together with innovative technology in the processing industry. In particular, he referred to gas-flushing of chilled meat as an innovation developed in New Zealand that contributed greatly to perception of quality by retailers. For the Greek meat, seafood and poultry distributor (F), the concept of free-range was the key, both for his business customers and for end-consumers. In the seafood sector in Germany and Italy, perceptions about the country from where products are sourced related mainly to hygiene, trust in production methods, lack of contamination, freedom from antibiotics (eg chloramphenicol in shrimps). Traceability was mentioned as “a hot item” by a respondent in the food service sector, and by three meat distributors. This has become particularly important in the aftermath of the BSE
specific fish species was paramount, whereas for the discount chain (which accounts for the great majority of product) COO was not important at all.

A UK distributor of a highly successful New Zealand-manufactured dessert product (Respondent L) believed that COO labelling for this product was a negative – certainly in view of scepticism among supermarket buyers concerning the logistics of delivery from 20,000 kilometres away. Furthermore, consumers would view the “pudding” concept as outbreak. Trust in the source of supply, especially in relation to chemical spray residues, was reported as necessary to avoid problems with regulatory authorities in the importer’s country and to avoid causing problems for business customers (Respondent H).

Technical details of production methods, chemical and microbiological standards are not matters that end-consumers are likely to be knowledgeable about, or able to discern at the point of purchase; standards of hygiene, spray residues and other standards relating to food security are likely to be expected as a given. To a considerable extent, consumers rely on supermarket chains and other retailers to take care of such considerations on their behalf. “Tesco sells it so it must be okay” (Respondent O). Familiar and trusted brands can provide further shorthand communication to consumers about trustworthiness of products. Attributes that are visually discernable by end-consumers were regarded as paramount when dealing with fruit (e.g. Respondents C and K, Table 3).

**Importance of country-of-origin?**

Respondents varied in their assessments of the importance of COO, depending on the type of company and sector they were in (Table 4). In food service and in manufacturing the COO is often lost before products reach the end consumer. The Dutch food service company
(respondent E) considered COO largely irrelevant, and felt that trustworthiness of a company was much more important than issues to do with the country. An interesting perspective was that consumers in the Dutch market regarded apples as “local” even though they might be imported from South America. An Italian seafood products manufacturer considered that end consumers would not know where the anchovies in a paste came from, for example. A German seafood sector expert drew a distinction between fish used for further processing and fish sold as a specialty item, Scottish and Irish salmon for example. He also drew a distinction between specialty retailers (fishmongers) and “the discount chain”. For fishmongers, COO of traditionally British and therefore local. The product is sold under house brands (private labels) in four major supermarket chains, and also appears under its own label. Mandatory requirements mean that it carries in small print “produced in New Zealand for …”, but the country-of-origin is not incorporated into the brand or given prominence in any way.

Respondent F believed that in his country (Greece) the linkage of product and COO was very strong – at least in regard to lamb (see Table 4). A UK distributor of Australian, South African and New Zealand wines considered “It’s the most important factor of it.” However, on further probing, he revealed that this perception relates more to quality of the wine than to scenic imagery of the country: “It’s not an emotional attachment to New Zealand, it’s the fact that good Sauvignon Blanc comes from New Zealand.” (Respondent N). A German fruit distributor considered New Zealand apples and kiwifruit to be “the Mercedes Benz among the fruit basket”, but based this evaluation on his perception of quality control standards, low pesticide residues, taste and appearance of fruit, and high packaging standards rather than perceptions of the country itself. An Italian meat distributor felt a country name was important as a proxy for “trustworthy”. According to the Italian supermarket chain (Respondent K) “this is product-specific ... consumers associate certain product with certain
country-of-origin.” This reported association seems partly based on tradition and partly on trust in products from that country. A UK distributor of specialty foods saw country symbolism as important in grabbing attention (“Oh, Australian!”), a factor he considered vital in the cluttered supermarket environment (Respondent M). This symbolism appeared to relate mainly to Australian celebrities (particularly in the movie and music industries) who have contributed prominently to the stereotype of the country itself.

A good example of a “mythological narrative” (Ger, Askegaard, & Christensen, 1999) attaching to a country name was provided by a German fruit buyer, reflecting on the significance of ‘New Zealand’ to his end consumers: “I don’t know if they are thinking about the country or – they are thinking ‘It’s a long way the fruit is coming – that is other end of the world, and there’s a good climate, and the sun is ever shining’ they are thinking – not the truth I know! But I could think that they know it, therefore they have every year good apples.”

Political considerations also impinge on assessment of product-country images in some cases. Israel was mentioned by two respondents as a country that their business customers would not wish to be supplied from: “Co-op (major Italian supermarket chain) for example has abandoned Israel because they are against the Israelis beating the Palestinians” (Respondent H). This provides support for the assertion mentioned in the introduction that “good products are seen to be produced by people who are… admirable for their role in world politics” (Heslop & Papadopoulos, 1993, p.67).

**Resource sustainability practices**

During discussion with seafood importers and distributors, it became clear that European supermarket chains – presumably in response to consumer demands – are becoming
very sensitive to the merits of Marine Stewardship Council certification in regard to sourcing seafood products. “Our customers ... are concerned due to the Marine Stewardship Council certification of the ocean ... the issue is growing steadily and in a few year's time we will have so-called aqua-labelling origin-wise” (Respondent B). This is a good example of an issue largely unknown to the interviewer emerging as a result of the open-ended question approach. New Zealand was cited as being very forward-looking in regard to this issue in comparison with other sources: “On the other side, Canada is not that well-known or specialised for fisheries management. We see that in the cod fishery, where we more and more have to learn that because of the increasing shrimp fishery...So, if the North Sea will be empty of cod will we see a huge shrimp fishery there? So in Canada we have this problem” (Respondent B).

**Genetic modification**

The topic of genetic modification (GM) produced diverse responses and was often first raised by respondents themselves. A clear consensus emerged that European consumers are not yet ready to accept GM foods, particularly in the prevailing climate of food-related fears. Some respondents thought the technology was inevitable, and considered that consumers would eventually accept GM foods that offered defined consumer benefits or lower prices. Details of these findings are reported elsewhere (Knight, Mather, & Holdsworth, In Press). Of particular relevance to the subject of this paper, some respondents were asked how they viewed conventional products from countries such as USA, Canada and Argentina that produce GM food crops, or countries such as Australia that produce GM non-food crops such as cotton or carnations. None could see any negative impact of GM on the image of these countries as suppliers of high quality food (Knight, Mather, & Holdsworth, In Press). For
example: “GM is GM. GM-free is GM-free. It doesn’t matter where it comes from. Basically it doesn’t matter about the country. It’s just a matter of being GM-free” (Respondent G).

Presence or absence of nuclear power generation was used as a test of how “environmentally questionable” practices may or may not influence perceptions of food products from a given country. Although not directly food-related, this issue was considered particularly relevant in view of its prominence in relation to the “clean green” image attributable to New Zealand (at least in the minds of most New Zealanders). The study sought to determine what value European food channel members place on an existing “nuclear-free” co-brand as an indicator of how a putative “GE-free” co-brand might be seen. According to the interviewees, countries like the USA, Canada and France that rely heavily on nuclear power are still held in generally high regard for food quality and food safety. This is hardly surprising considering the widespread use of nuclear power technology in Europe, and the generally excellent safety record in this controversial industry. The notable exception provided by the Chernobyl disaster, attributable to human error in conducting an ‘experiment’ that went wrong, is now largely dismissed as an artefact of the communist era rather than equating to overall mistrust of the technology. New Zealand’s nuclear free policy was unknown to most respondents, and appeared to have little impact on perceptions of country image for food products. Respondent F indicated that publicity given to New Zealand’s position on nuclear testing led people in Greece to think that New Zealand’s shores must be contaminated. (He was very surprised to learn that Mururoa Atoll, site of French nuclear testing, is approximately 5000 kilometres from New Zealand – similar to the distance from Athens to Iceland.) As an indicator of the extent of any marketing advantage that New Zealand might derive from a “GE-Free New Zealand” brand, the “Nuclear-Free New Zealand” brand seems rather ineffectual.
Discussion

This study was designed to determine the degree of importance leading food buyers in Europe assign to country image when evaluating imports of food from different countries, in the context of all the other factors used in making such evaluations. Specific issues that could impact on food buyer perceptions of country image were explored. As might be expected, the over-riding factor in determining purchase decisions by European food buyers is price. Especially in highly price-sensitive markets like Germany and Greece, the price for a given quality outweighs all else. This finding is compatible with previous studies of industrial and retail buyer behaviour.

Industrial buying decisions (concerning components or raw ingredients for further manufacture) are often made within a “buying centre”. Retail buying decisions are commonly made autonomously by the retail buyer (McGoldrick & Douglas, 1983, Sternquist, 1993, Wagner, Ettenson, & Parrish, 1989), although “in larger organizations there is an increased probability of the ultimate decision being the responsibility of a committee…Discussion in committee form assists in minimising perceived risks” (McGoldrick & Douglas, 1983, p.18).

One study found that industrial buyers did not associate higher quality with higher price (White & Cundiff, 1978). Another (Hakansson & Wootz, 1975) concluded (p.49) that an industrial buyer “very seldom reacts to higher quality when the minimum requirements are fulfilled … purchasers always are told to be aware of the quality, but they are not rewarded when they find a supplier offering a better quality…(However they) will be rewarded if they find a cheaper supplier because of the effects on the purchasing budgets.”
McGoldrick and Douglas (1983) developed a model of the supplier selection process for food products based on seven key factors found to influence the buying decision, namely: characteristics of the supplying company, characteristics of the product, variety of product offered, pricing factors including volume and promotional discounts, marketing support to the product or brand, reliability and ability to comply precisely with delivery conditions, and personal and interpersonal factors (McGoldrick & Douglas, 1983). Country from which products originated did not appear to be included in this study.

A study of decision-making in relation to retailer-brand imported food products by one large UK multiple food retailer showed the importance of quality considerations, the need for product variety, and premium or standard positioning (Shaw, Dawson, & Blair, 1992). Evaluative criteria were found to fall in four broad areas: product factors, range compatibility issues, price in relation to quality, and supply factors. COO appeared largely irrelevant, with the authors noting: “there is nothing inherently different in the decision to source from outside the UK, particularly since most of the imported items in question came from Europe, most notably from Belgium, the Netherlands, France and Germany” (Shaw, Dawson, & Blair, 1992, p.137). Johansson (2002, p.581) found that food retailer buyers, particularly in the UK, have access to vast amounts of information to the point where “a situation of information overload seems to exist…Since sense making is difficult, buyers chose to be very selective.” Shaw et al (1992) concluded that “most retail buyers are buying many products and operating in a pressured work environment with little time available to evaluate in a formal way detailed and subtle criteria”(p.129). Decision-making by retail buyers can be seen as a process of minimising perceived risk (Hakansson & Wootz, 1975, Sheth, 1973). Higher risk can be “associated with foreign procurement because of uncertainty about quality and because of problems with returning merchandise to the vendor” (Sternquist, 1993, p.160).
Apart from these pragmatic considerations is the issue of what stereotypic image end consumers might have of the source country and the extent to which consumer-held stereotypes might contribute to, or ameliorate, risk as perceived by the retail buyer. Increasingly in the grocery sector “buying starts with selling to the consumer rather than buying from the manufacturer” (Johansson, 2002, p.583). Retail buying, including grocery buying, “demands that the buyers become connoisseurs of consumer tastes and forecasters of what will be popular months in the future” (Sternquist, 1993, p.160). So what are the issues for consumers, and what account do retail buyers take of these? One might anticipate that safety in regards to food over-rides most other considerations given the prevailing food-scare dominated climate.

Once full account is taken of price, the most important considerations identified in this study relate to factors involving confidence and trust – not only in the tangible product and its packaging, but also in the exporting country’s government regulatory agencies, the supplying company, the transportation systems, and all the intermediaries including the agent or distributor in the destination country (Knight et al., in preparation). Of increasing importance is the issue of traceability – being able to trace food products right back to the processing plant, and even to the farm or orchard gate. Previous research has found traceability to be more important in some countries than others, with German firms placing particular importance on this (Skytte & Blunch, 2001). These factors are well-known to international marketers, and New Zealand has gone to great lengths to build trust and confidence relating to these issues. A related issue is the value of third party certification, in particular Marine Stewardship Council certification of sustainability. Third-party certification marks have previously been found to enjoy high levels of recognition, even though consumers may
misperceive their information content and take more comfort from them than is warranted (Laric & Sarel, 1981).

Country mental imagery has emerged as remarkably unimportant in food categories where raw ingredients are imported for further processing, but also in the food service sector – except that country designation may serve as a proxy for trust and reliability. Similarly, the relationship between product-country image and industrial buying behaviour of Swedish seafood purchasing managers has been observed to be weak (Olsen & Olsson, 2002). In contrast, Liefeld concluded from his meta-analysis that purchasing agents place more importance on COO in their product evaluations than do consumers, but few of the studies analysed concerned food products (Liefeld, 1993) and it is unclear what elements of COO were deemed influential.

A high percentage of New Zealand food exports leave New Zealand shores unbranded and are not identified with New Zealand as COO in the market place. Once such products enter food service channels for distribution to restaurants, hotels, hospitals, schools, and institutions of many types, COO typically becomes unimportant and indeed unknown to the end consumer. A German chef placing ‘hirschfleisch’ (venison) on the menu is likely to hope that the end consumer has visions of the Black Forest in mind, rather than visions of green paddocks and 2 metre-high wire fences in New Zealand. When commodities enter the manufacturing sector also, as raw materials or ingredients for processed goods, COO is often lost. In some food categories, for example the puddings referred to in one of our interviews, New Zealand COO was reported as a detracting factor if anything.
A study of purchasing behaviour in the Northern Ireland wine market found that COO was indeed the most important of ten factors reported by consumers selecting wine; however, when asked why they preferred their favourite wine, the majority of responses were related to “taste”, “quality”, “palatability”, “value for money”, and intrinsic qualities of the wine such as “dry”, “fruity”, “full-bodied” or “refreshing” (Keown & Mura, 1995). So, it seems that perception of characteristics of a product from a given country may over-ride general perceptions of the ambience of the country in itself, in line with the contention that a halo effect gives way to a summary construct once consumers become familiar with a country’s products (Han, 1989, Nebenzahl, Jaffe, & Lampert, 1997). The results of the present study suggest that industrial and retail buyers use summary constructs based on specific technical, experiential, and assurance-based factors.

The cost of brand-switching for consumers in relation to supermarkets is often negligible – they can simply visit some other supermarket, so such outlets strive very hard to retain customers. Food buyers for these supermarket chains place great store on purchasing from localities and companies they trust in order to avoid unhappy consequences – either from disgruntled consumers or from being caught out by regulatory authorities. In turn, consumers place their trust in the supermarket to source products from safe places. In certain product-specific areas, COO does become part of the brand of a product, or acts as a halo to enhance consumer confidence in the brand, but this does not appear to be the general case. Because industrial and retail buyers will be very familiar with the characteristics of products and suppliers from many different countries, it is understandable that their perceptions are based more on summary constructs comprising specific attributes of products, suppliers, and regulatory authorities from a particular country than on country image as a halo.
Figure 1 draws on emic interpretations of the rich insights provided by gatekeepers in this study. It provides an etic representation of the many factors which have been identified both in this study and in the literature as influencing food purchasing decisions by European food channel members. This contextual model aims to relate country image and factors that determine it to all the other factors that bear on purchasing decisions of channel members, and attempts to show the interconnections which seem to exist between these factors. Hopefully, this study will lead to further research to establish the relative importance of these links and pathways.

**Conclusion**

Perceptions of the country image of New Zealand, and indeed any other country, among channel members in the European food markets appears to relate more to factors involving confidence and trust in the integrity of regulatory systems and suppliers than it does to “clean green” mental stereotypic images of landscape, water and sky. Risk to New Zealand’s “clean green image” in foreign markets for food products is often cited as a basis for recommending governmental policy and commercial strategy, most recently in regard to debate concerning commercial release of genetically modified organisms. However, in the eyes of “gatekeepers” of the food channel interviewed in this study, the role of country stereotypic image seems secondary to more pragmatic considerations.

This study in no way precludes the possibility that in the future food markets in Europe may appreciate the halo effect of a “clean, green” country image as a result of a well managed integrated marketing communications strategy. However, we conclude that this is not the most important factor at present. According to Skaggs et al. (1996, p.599) “product-country images that extend an aura of riskiness to food products are a serious problem for
marketers, particularly when in direct competition with products perceived to be less risky.”

Our study indicates that in the eyes of the food channel members interviewed, New Zealand is in the fortunate position of being perceived as “less risky” than many other countries, as a direct result of the efforts that have been made to institute the best quality control and traceability systems and technology available.

References


**Table 1. Topics used to guide interviews**

- Problems encountered with food sourced from particular countries
- Issues considered when choosing source countries
- Reasons for deciding against purchasing from particular countries
- Aspects of food quality that influence purchasing decisions
- Quality issues that most influence your industrial customers
- Extent to which products retain country brand in channel
- Aspects of country-of-origin that influence your customers’ choice
- Extent to which country image influences purchase decisions, by industrial buyers and/or consumers
- Examples of countries that customers (industrial and/or end consumers) consider produce high quality food
- Factors determining perceptions of quality of food from particular countries
- Trustworthiness
- Importance of hygiene standards
- Quality control, grading
- Freedom from chemical residues, hormones
- Organic production
- Pasture feeding versus feedlot
- Environmental conditions, population density, industrial pollution
- Employment conditions, social aspects, political aspects
- Nuclear power
- Diseases in livestock
- Genetic modification – general aspects
- GM specific applications
- GM food crops, animals for meat and dairy
- GM pasture and animal feed
- GM for environmental benefit: pest control, bioremediation, reducing greenhouse gases
- Countries already producing GM crops
- Countries regarded as ‘clean green’
- Factors likely to damage or enhance that reputation
- “Nuclear-free” co-brand? “GM-free” co-brand?
Table 2. Profile of key informants, companies, and organizations in sample

<table>
<thead>
<tr>
<th>Company</th>
<th>Interviewee</th>
<th>Sector</th>
<th>Location</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>CEO</td>
<td>Meat</td>
<td>Hamburg, Germany</td>
<td>Major importer/distributor of meat since 1980</td>
</tr>
<tr>
<td>B</td>
<td>CEO</td>
<td>Seafood</td>
<td>Hamburg, Germany</td>
<td>Manufacturer and distributor of seafood products</td>
</tr>
<tr>
<td>C</td>
<td>a. Importer/buyer b. CEO</td>
<td>Fruit</td>
<td>Hamburg, Germany</td>
<td>126-year old fruit importer and distributor throughout Europe</td>
</tr>
<tr>
<td>D</td>
<td>Director</td>
<td>Seafood</td>
<td>Hamburg, Germany</td>
<td>German seafood industry organization</td>
</tr>
<tr>
<td>E</td>
<td>Director</td>
<td>Food Service</td>
<td>Rotterdam, Netherlands</td>
<td>Very large food service supplier, among the largest food distribution companies in World</td>
</tr>
<tr>
<td>F</td>
<td>a. CEO b. Partner</td>
<td>Meat</td>
<td>Athens, Greece</td>
<td>Agent/distributor for meat, poultry and seafood companies from various countries</td>
</tr>
<tr>
<td>G</td>
<td>Director of Vet. Hygiene &amp; Quality</td>
<td>Meat and seafood</td>
<td>Milan, Italy</td>
<td>Manufacturer and distributor of meat and seafood products</td>
</tr>
<tr>
<td>H</td>
<td>a. Importer/buyer b. CEO</td>
<td>Fruit</td>
<td>Bologna, Italy</td>
<td>Major fruit importer and distributor</td>
</tr>
<tr>
<td>I</td>
<td>Publisher</td>
<td>Meat &amp; Seafood</td>
<td>Modena, Italy</td>
<td>Publisher of trade magazines for meat and seafood sectors</td>
</tr>
<tr>
<td>J</td>
<td>Agent/distributor</td>
<td>Meat</td>
<td>Milan, Italy</td>
<td>Agent/distributor meat products</td>
</tr>
<tr>
<td>K</td>
<td>4 Directors &amp; Food buyers</td>
<td>Fresh food, meat &amp; other FMCG</td>
<td>Milan, Italy</td>
<td>Head Office of one of the largest supermarket chains in Italy</td>
</tr>
<tr>
<td>L</td>
<td>2 Directors</td>
<td>Manufactured foods</td>
<td>London, UK</td>
<td>Importers of manufactured foods; distributors to prominent restaurants, major supermarket chains, and specialty retailers</td>
</tr>
<tr>
<td>M</td>
<td>a. Com.Director b. Accounts Exec.</td>
<td>Specialty foods</td>
<td>London, UK</td>
<td>Importers and distributors of specialty foods; formerly head wine buyer for major supermarket chain</td>
</tr>
<tr>
<td>N</td>
<td>Sales Manager, Europe</td>
<td>Wine</td>
<td>London, UK</td>
<td>Importer and distributor of New Zealand, Australian and South African wines; former manager for one of largest food retailers in world (by no. of outlets)</td>
</tr>
<tr>
<td>O</td>
<td>Managing Director</td>
<td>Meat</td>
<td>London, UK</td>
<td>UK distributor for major meat company; serves major supermarkets and food service cos.</td>
</tr>
<tr>
<td>P</td>
<td>UK Marketing Manager</td>
<td>Wine</td>
<td>London, UK</td>
<td>A New Zealand wine industry organization</td>
</tr>
<tr>
<td>Q</td>
<td>Media Liaison Officer</td>
<td>Food retail</td>
<td>London, UK</td>
<td>One of the 3 largest supermarket chains in the UK</td>
</tr>
</tbody>
</table>
Table 3. Examples of issues considered when choosing source countries

<table>
<thead>
<tr>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Germany is a very low priced country. Low price means not bad quality, but certain quality” (Respondent D, Germany)</td>
</tr>
<tr>
<td>“Whatever is cheaper we go with it – of course we will not buy rubbish” (Respondent F, Greece)</td>
</tr>
<tr>
<td>“They expect more quality, and usually they identify more quality in a higher price” (Respondent I, Italy)</td>
</tr>
<tr>
<td>“Italy is a sophisticated market – we have a good standard, but only in the north” (Respondent J, Italy)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hygiene and perceptions of quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Cleaness, the cleanness of the nature, the cleanness of the factories…the rich green grass, that is something which is important” (Respondent A, Germany)</td>
</tr>
<tr>
<td>“Fish farming can be ISO 9002 and all that, but still prefer the one that the fisherman has (caught). Still prefer the free animal” (Respondent F, Greece)</td>
</tr>
<tr>
<td>“Not so much trust in these countries … microbiological problems in South America and China” (Respondent G, Italy).</td>
</tr>
<tr>
<td>“Food security … for food service, there’s no question about that – but then the best is who is cheapest. We don’t care so much which name is behind that source” (Respondent B, Germany).</td>
</tr>
<tr>
<td>“The interesting thing is you don’t get to the buyer (of a supermarket chain) until you’ve gone past quality control…I must be accredited, I must be approved, I must have a farm assurance scheme, I must have traceability” (Respondent O, UK)</td>
</tr>
<tr>
<td>“If there should be a court case, we have several in the past, if you can show you have been very attentive to the residues matter, they will be much more flexible towards you” (Respondent H, Italy).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Visual perception</th>
</tr>
</thead>
<tbody>
<tr>
<td>“The quality, first they look with their eyes, and then the taste…You need good appearance, you need shelf-life, good taste, then you need health” (Respondent C, Germany)</td>
</tr>
<tr>
<td>“In Italy the consumers have a good eye – that means they want good quality, nice colour, big fruit, beautiful packaging, this is a difference between Italy and Holland for example” (Respondent K, Italy).</td>
</tr>
</tbody>
</table>
Table 4. How Important is Country Image in the Distribution Channel?

“The final consumer is not that much concerned at the moment because he does not know all the details and he does not know whether Malaysian prawns are better prawns than from Bangladesh. He is not aware” (Respondent B, Germany)

“If you ask a fish monger he will have a very distinct view on specific items. He will say mussels, this specific mussel, I only buy in France. And this specific lobster, I only buy in France. And that specific surimi, I only buy there. People know I have to buy tuna from Mozambique, or from Oman because that is absolutely top quality. I think we have to take that into mind that this is valid.” However, “Most of the fish by quantity goes over the discount chain. There is nobody interested in the country, it’s just interesting to see that fish – it’s cheap, it’s secure, and it’s tasty” (Respondent D, Germany)

“The company is important, traceability is a hot item, and the country is the last issue. And I think it is more or less related to freight charges and doing the way of business.” “It is not stipulated to a country. We don’t say Spain is a safe or clean country. We source from a certain Spanish company which we know by heart. We know the owner, we know how they treat the product.”

“A lot of Dutch people consider apples as local, although we buy them from South America” (Respondent E, Netherlands)

“If you go outside and you tell from where are you come from, and you say New Zealand, they will say ‘Ah! New Zealand Lamb!’ Yes, this is well-known” (Respondent F, Greece)

“Imported raw materials are made into a European product. The origin of the product is not so important” (Respondent G, Italy)

“I would say that this is product-specific. Because consumers associate certain product with certain country-of-origin, and this is well-accepted. So, in case of orange, I would say consumers appreciate it coming from Italy, but Spain is a good alternative because everyone has in mind that orange from Spain are good quality” (Respondent K, Italy)

“That (product) was hugely Australian before and we have toned it down…Australia should be proud of that because it’s got symbolism – Australian symbolism. I would hope they are purchasing it because they want to try something different: Oh, Australian! And bearing in mind that the average customer only has half a second to look at a product, register – nice label, interesting pack, pretty colours, let’s go back for another look.” (Respondent M, UK)

“Brand New Zealand is the first point I think– New Zealand within the wine business – people that know wines know that New Zealand Sauvignon is the best in the world” (Respondent N, UK)

“In the multiple and supermarket areas it (country-of-origin) is important. If we’re talking in manufacturing and processing areas then it has lost its identity. It’s another article really. In the catering sector again it’s lost its identity” (Respondent O, UK)

“A country-of-origin sub-brand has been used for “Italian” and “British-grown”. In the case of “Italian” this had to do with perceptions of “innovative”, “new”, “fashionable”, “trendy”, “quality” – NOT food safety” (Respondent Q, UK)
Figure 1. Contextual representation of factors influencing purchase of imported food products by gatekeepers